



Columbus Redevelopment Commission Outdoor Amphitheater in Mill Race Park Market Analysis

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Introduction

This report is intended to inform the Columbus Redevelopment Commission about the current resident marketplace and to aid in programmatic and marketing considerations for a refurbished outdoor amphitheater in Mill Race Park. An examination of market area demographics and lifestyle behaviors can help shape the activity profile and marketing strategy for the renovated venue.

Market areas considered in this report are as follows:

- **Primary Market Area:** the 15 ZIP Codes that are within an approximate 30-Minute drive around Mill Race Park
- **Total Trade Area:** the additional 104 ZIP Codes that are within an approximate 60-minute drive
- **State:** the entire state of Indiana

Part I: “Market Scan” contextualizes the demographics and behavioral attributes of the market areas by comparing (Part A) the primary market area to both the state and the United States, and (Part B) the total trade area to both the state and the United States. AMS compares market areas to both the region and the United States to distinguish between regional characteristics and characteristics unique to the market area and any differences in consumer demand.

Part II: “In-Depth Consumer Insights” uses national consumer research data to identify specific segments in the market areas that show an increased potential to consume the product(s) of interest. For this study, we examine the potential to “go to rock/pop concerts.” These findings are then compared to the Market Scan to help estimate consumer demand and determine which geographic areas represent the most potential for participation.

Key Findings

- The primary market area population tends to be older (over 45) than the total trade area. The fastest growing age segment in

the primary market next five years is expected to be individuals 65-74.

- The primary market population tends to identify as “White,” but over the next five years, the area is expected to become more diverse with growth of African Americans and Hispanic or Latino individuals occurring faster than national growth.
- Households in the primary market tend to be middle-class families who, at least according to their likelihood to attend “rock/pop” concerts, are **not** a first-choice primary target.
- Households in the primary market are slightly more likely than the average US household to participate in certain arts and culture activities, including:
 - Play Musical Instrument
 - Do Painting/Drawing/Sculpting
 - Buy Latin Music
 - Do Photography
 - Go to Museum
 - Go to Music/Dance Performance
- **The total trade area holds more potential than the primary market area for attracting patrons to “rock/pop” concerts.** The following three groups of households that represent attractive targets:
 - Childless singles and couples in their thirties and forties make up 15% of households and are **1.7 times more likely to attend “rock/pop” concerts** than the average US household
 - Twenty-somethings who have recently settled in metro neighborhoods with incomes ranging from working-class to well-to-do make up 8% of households and are **1.8 times more likely to attend**
 - Twenty-something singles with low incomes make up 20% of households and are **1.1 times more likely to attend**
- Certain ZIP Codes have more potential to contain target households. High potential areas include those found:
 - In downtown Indianapolis;

- Right outside or near the beltway of Indianapolis, including Greenwood, Bagersville, Boggstown, Brownsburg, and Morristown; and
- In Bloomington.

I. Market Scan

Part A. Primary Market Area

Demographic Summary

The primary market area selected for study contains the 15 ZIP Codes that are within an approximate 30-Minute drive around Mill Race Park. Generally, a primary market is where an organization would expect to find 75-85% of its customers. Given the location and the expected programmatic nature of this site, an additional secondary market area is also examined.

The 2015 population in the primary market is estimated to be 173,388. Over the next five years, the population is projected to grow by 3.9%. The 2015 number of households in this area is estimated to be 66,289. Over the next five years, the number of households is projected to increase by 4.1%.

The current year median age for this area is 38.2, while the average age is 38.6.

90.9% of individuals are White, 1.9% are Black or African American, 0.3% are American Indian and Alaska Native, 2.5% are Asian, 2.7% are some other race, and 1.7% are two or more races. This area's current estimated Hispanic or Latino population is 5.7%.

The average household income is estimated to be \$66,580 for the current year.

Currently, an estimated 6.9% of the population age 25 and over in this area has earned a Master's Degree, 0.8% has earned a Professional School Degree, 0.6% has earned a Doctorate Degree and 13.9% has earned a Bachelor's Degree.

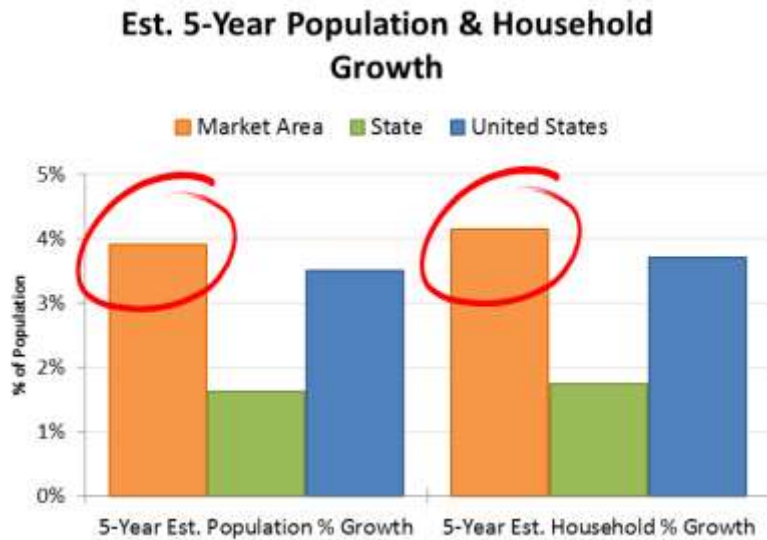
2015 Demographic Snapshot

Market Area: Columbus, IN Amphitheatre Primary Market (30-Minute Drive Time)

Region: State of Indiana

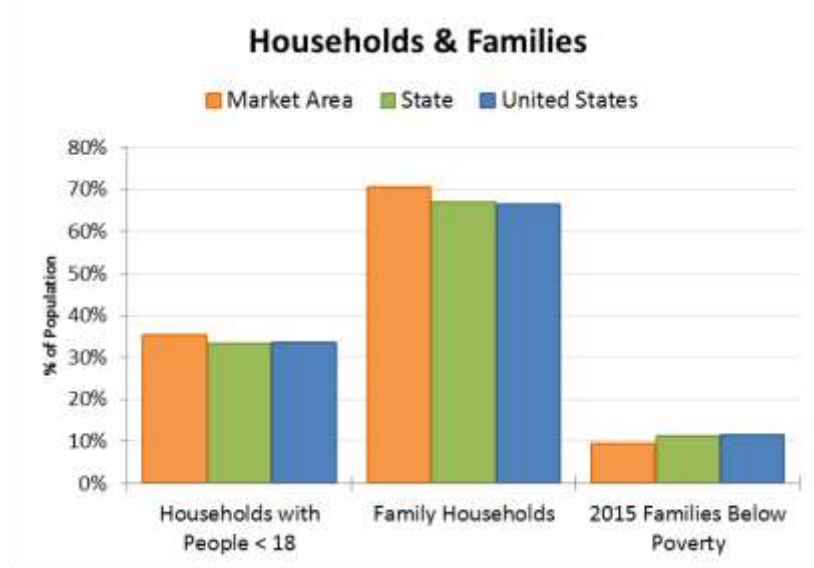
	Market Area	Region	United States
Population			
2015 Estimate	173,388	6,567,159	317,199,353
2020 Projection	180,180	6,673,232	328,309,478
5-Year Est. Population % Growth	3.9%	1.6%	3.5%
Households & Families			
2015 Household Estimate	66,289	2,537,304	120,163,323
2020 Household Projection	69,035	2,581,446	124,622,797
5-Year Est. Household % Growth	4.1%	1.7%	3.7%
Households with People < 18	23,476 35.4%	33.4%	33.5%
Population by Age			
Under 5	11,312 6.5%	6.5%	6.4%
5 - 17	31,296 18.0%	17.6%	17.0%
18 - 24	15,557 9.0%	10.4%	10.0%
25 - 44	43,905 25.3%	24.9%	26.0%
45 - 64	45,810 26.4%	26.4%	26.5%
65 and Over	25,508 14.7%	14.1%	14.2%
2015 Est. Average Age	39 0%	38	39
2015 Est. Median Age	38 0%	37	38
Population (Age 25+) by Education Attainment			
Bachelor's Degree	15,977 13.9%	14.7%	17.8%
Master's Degree or Higher	9,601 8.3%	8.2%	10.6%
Household Income			
2015 Est. Average Household Income	\$66,580 0	\$61,175	\$71,319
2015 Est. Median Household Income	\$53,933 0	\$47,121	\$51,579
Population Hispanic or Latino by Origin			
Hispanic or Latino	9,949 5.7%	6.8%	17.6%
Population Race Class			
White	157,674 90.9%	83.5%	71.3%
Black or African American	3,230 1.9%	9.3%	12.7%
Amer. Indian and Alaska Native	509 0.3%	0.3%	1.0%
Asian	4,389 2.5%	1.8%	5.0%
Native Hawaiian and Other Pac. Isl.	81 0.0%	0.0%	0.2%
Some Other Race	7,505 4.3%	5.1%	9.8%

Demographic Details



The population in this market area is expected to grow at a significantly faster rate than the state.

Between 2015 and 2020, a growth of 3.9% is expected. In comparison, the population of the state is expected to grow at a rate of 1.6% and the population of the United States is expected to grow at 3.5%



In this market area, households are slightly more likely to be family households (households with at least two related people) and have people under 18 living in the household.

In the market area 70.6% of households are classified as family households, compared to 66.9% in the state and 66.5% in the United States.

In this market area, families are slightly less likely to live below the poverty line.

In the market area 9.3% of family households live below the poverty line, compared to 11.4% in the state and 11.5% in the United States.

Household Income



In the state, households are more likely to have “Middle Class” incomes and *less* likely to have “Upper Class” incomes.

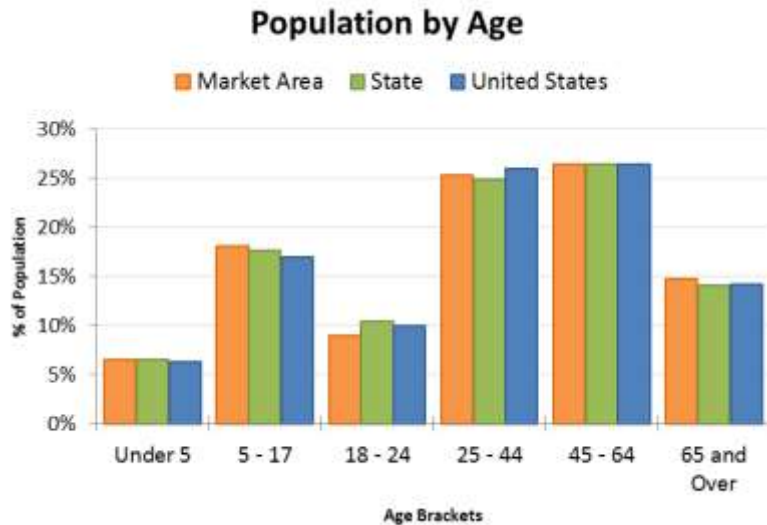
37.0% of households in the market area (and 34.7% in the state) have incomes between \$35,000 and \$74,999, compared to 31.8% in the United States. Additionally, only 5.9% of market area households (and only 5.2% in the state) have incomes \$150,000 or higher, compared to 9.0% in the United States.

Owner-Occupied Housing Values



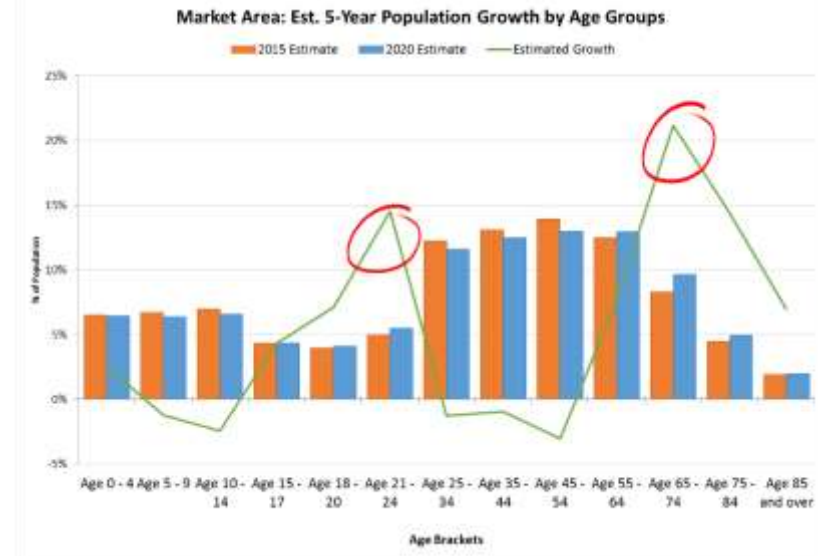
In the state, housing values are more likely to be less than \$300,000 than in the United States.

In the market area, 91.4% of housing values (and 90.9% in the region) are less than \$300,000, compared to 74.1% in the United States.



In this state, the population age has very similar distribution to population of the United States.

In the market area, 39 is the 2015 average age (38.2 median), compared to 39 average age (37.7 median) in the United States and 38 average age (37.4 median) in the state.



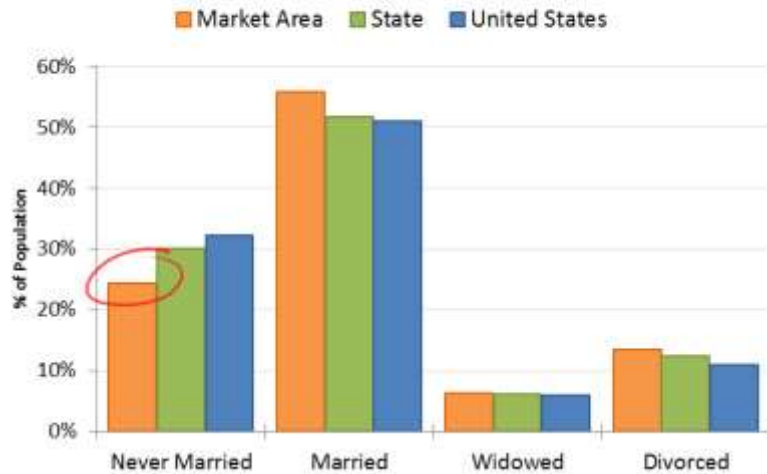
Over the next five years, the fastest growing age segments in this market area are expected to be segments 65-74 and 21-24.

By 2020, the age segment 65-74 is expected to grow 21% in the market area, compared to an expected 25% growth in the United States.

By 2020, the age segment 21-24 is expected to grow 15% in the market area, compared to an expected 3% growth rate in the United States.

Overall, the market area's median age is expected to increase from 38.2 to 39.0, compared to an expected 38.6 in the US.

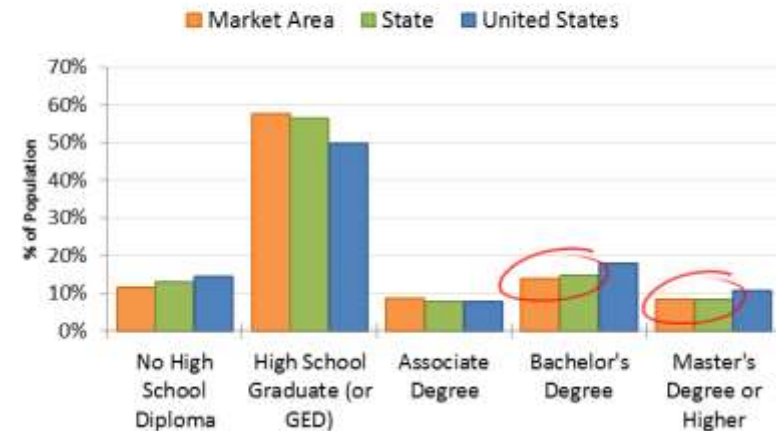
Population (Age 15+) by Marital Status



In this market area, the population is less likely to have *never* been married than the region and the United States.

In the market area, only 24.3% of population (age 15+) has never been married, compared to 30.0% in the state and 32.2% in the United States.

Population (Age 25+) by Education Attainment



In the state, the population is *less* likely to have attained education beyond an Associate Degree than in the United States.

Only 22.2% of the population (age 25+) in the market area (and 22.9% in the state) have attained a Bachelor's Degree or higher, compared to 28.4% in the United States.

Population (Age 16+) by Occupation Classification



In the state, the population is more likely to work in “Blue Collar” occupations than in the United States.

29.1% of the population (age 16+) in the market area (and 26.2% in the state) holds an occupation classified as “Blue Collar,” compared to 20.4% in the United States.

Only 54.1% of the population (age 16+) in the market area (and 56.2% in the state) holds an occupation classified as “White Collar,” compared to 60.7% in the United States.

Population Race Class



In the state, the population is more likely to identify as having non-Hispanic or Latino origins than in the United States.

In the market area, only 5.7% of the population (and 6.8% in the state) identify as having Hispanic or Latino origins, compared to 17.6% of the United States.

In this market area, the population is more likely to identify as White and less likely to identify as Black or African American than in the state or in the United States.

In the market area, 90.9% of the population identify as White, compared to 83.5% in the state and 71.3% in the United States. Only 1.9% of the market area population identify as Black or African American, compared to 9.3% in the state and 12.7% in the United States.



Over the next five years, the fastest growing race/ethnic groups in this market area are expected to be Black or African American, Asian, and Hispanic or Latino groups.

By 2020, the Black or African American group is expected to grow 43% in the market area, compared to an expected 4% growth in the United States.

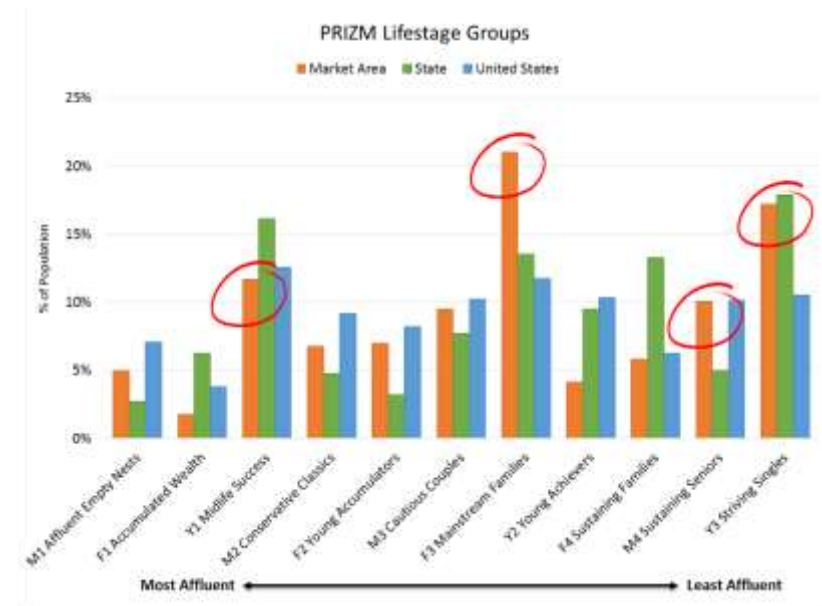
By 2020, the Asian group is expected to grow 29% in the market area, compared to an expected 10% growth rate in the United States.

By 2020, the Hispanic or Latino Origins group is expected to grow 21% in the market area, compared to an expected 13% growth rate in the United States.

Market Segmentation

PRIZM, AMS's market profiling and segmentation system developed by the Nielsen Company, is a micro-geographic consumer targeting system that segments every household in the United States into one of 66 unique clusters based on similar demographic and behavioral attributes. Clusters can then be grouped into PRIZM Lifestage groups that assigns households based on these factors:

- Affluence, a combination of household income and net wealth
- Householder Age & Household Composition, in particular whether or not the household has kids still living at home:
 - M = Mature Years
 - F = Family Life
 - Y = Younger Years



60% of market area households can be found in four PRIZM Lifestage groups. The two largest groups present in the market area (F3: Mainstream Families and Y3: Striving Singles) are also the most “overrepresented” in the market area, compared to the United States. Combined, these two Lifestage groups contain 38% of households.

F3: Mainstream Families households comprise 21% of market area households and are 1.6 times more concentrated in the market area than in the region and 1.8 times than in the US:

***Mainstream Families** are middle-class and working-class child-filled households. While the age range of adults is broad--from 25 to 54--these are households with at least one child under 18 still at home. Residents in this exurban group share similar consumption patterns, living in modestly priced homes--including mobile homes--and ranking high for owning three or more cars. As consumers, Mainstream Families maintain lifestyles befitting large families in the nation's small towns: lots of sports, electronic toys, groceries in bulk, and televised media.*

Y3 Striving Singles households comprise 17% of market area households and are 1.6 times than in the US:

***Striving Singles** make up the most downscale of the Younger Years class. Centered in exurban towns and satellite cities, these twenty-something singles typically have low incomes--often under \$30,000 a year--from service jobs or part-time work they take on while going to college. Housing for this group consists of a mix of cheap apartment complexes,*

dormitories, and mobile homes. As consumers, the residents in these segments score high for outdoor sports, movies and music, fast food, and inexpensive cars.

The next two largest groups present in the market area are Y1: Midlife Success (12% of households) and M4: Sustaining Seniors (10% of households), a group that is 2.0 times more concentrated in the market area than in the state:

***Midlife Success** are childless singles and couples in their thirties and forties. The wealthiest of the Younger Years class, this group is home to many white, college-educated residents who make six-figure incomes at executive and professional jobs but also extends to more middle class segments. Most of these segments are found in suburban and exurban communities, and consumers here are big fans of the latest technology, financial products, aerobic exercise, and travel.*

***Sustaining Seniors** are older, economically challenged Americans. Ethnically diverse and dispersed throughout the country, they all score high for having residents who are over 65 years old and who have household incomes under \$30,000. Many are single or widowed, have modest educational achievement, and live in older apartments or small homes. On their fixed incomes, they lead low-key, home-centered lifestyles. They're big on watching TV, gardening, sewing, and woodworking. Their social life often revolves around activities at veterans clubs and fraternal organizations.*

Affinities

To better understand the market area's product and service preferences, the **Profile Ranking Index** report compares a collection of Television Viewership, Radio Media Usage, Sports & Leisure Activities and Psychographic profiles against the PRIZM profile of the market area to determine which are used/occur at above-average and below-average rates in the segments that have the highest concentrations in the market area.

The affinities most strongly correlated to this market area are:

Affinities	Index	ROC
Country Radio, Net Audience (A)	109	.69
Own Rifle/Shotgun (A)	110	.69
Go Hunting, 1yr (A)	114	.67
Watch History, American Pickers, 1mo (A)	106	.66
Own Fishing Equipment (A)	108	.64
Buy Fishing Equipment, 1yr (A)	110	.61
Fan of Truck Racing/Pulls (A)	109	.59
Fan of Rodeo (A)	104	.59
Go Fresh Water Fishing, 1yr (A)	110	.58
Watch Ax Men, 1mo (A)	111	.58
Do Woodworking/Furniture Refurnishing, 1yr (A)	108	.53
Fan of NASCAR Racing (A)	104	.51
Do Bird Watching, 1yr (A)	104	.50

The Rank Order Correlation (ROC) value indicates how strongly each interest, behavior or activity correlates to the PRIZM profile of the market area. Values >.5 are considered strong relationships.

The Index (average United States household = 100) indicates how much more likely households in the

market area are to participate in each interest, behavior or activity, compared to the average household in the US. For example, an index of 109 indicates that households in the primary market area are 1.09 times more likely to listen to Country Radio than the average household in the US.

Arts & Culture Affinities

Affinities	Index	ROC
Go to Zoo, 1yr (A)	111	.05
Play Musical Instrument, 1yr (A)	108	.07
Do Painting/Drawing/Sculpting, 1yr (A)	107	-.07
Buy Latin Music, 1yr (A)	106	-.32
Do Photography, 1yr (A)	106	.08
Go to Museum, 1yr (A)	104	-.22
Go to Music/Dance Performance, 1yr (A)	103	-.17
Music Is an Important Part of My Life, Agr (A)	102	-.15
Interested in The Arts, Agr (A)	101	-.26
Make Charitable Contribution, 1yr (A)	100	-.06
Go to Live Theater, 1yr (A)	95	-.34
Go to Classical Concert, 1yr (A)	94	-.37
Buy Classical Music, 1yr (A)	94	-.32
Contribute to PBS, 1yr (A)	93	-.12
Classical Radio, Net Audience (A)	90	-.27
Belong to an Arts Association (A)	89	-.27
Jazz Radio, Net Audience (A)	89	-.47
Buy Jazz Music, 1yr (A)	89	-.40
Contribute to PBS,\$50+, 1yr (A)	79	-.16

The demographic and lifestyle profiles of Arts & Culture interests, behaviors or activities correlate weakly to the profile of the market area; however, there are some behaviors with above average (100) indices, indicating households in the market area are more likely to participate in those activities than the average US household.

Part B. Total Trade Area

Demographic Details

2015 Demographic Snapshot

Secondary Market: Columbus, IN Amphitheatre Secondary Market (60-Minute Drive Time)

Region: State of Indiana

	Total Trade Area	State	United States
Population			
2015 Estimate	1,640,155	6,567,159	317,199,353
2020 Projection	1,691,313	6,673,232	328,309,478
5-Year Est. Population % Growth	3.1%	1.6%	3.5%
Households & Families			
2015 Household Estimate	645,541	2,537,304	120,163,323
2020 Household Projection	665,697	2,581,446	124,622,797
5-Year Est. Household % Growth	3.1%	1.7%	3.7%
Households with People < 18	212,219 32.9%	33.4%	33.5%
Population by Age			
Under 5	112,085 6.8%	6.5%	6.4%
5 - 17	286,163 17.4%	17.6%	17.0%
18 - 24	176,777 10.8%	10.4%	10.0%
25 - 44	442,835 27.0%	24.9%	26.0%
45 - 64	415,705 25.3%	26.4%	26.5%
65 and Over	206,590 12.6%	14.1%	14.2%
2015 Est. Average Age	37 0%	38	39
2015 Est. Median Age	36 0%	37	38
Population (Age 25+) by Education Attainment			
Bachelor's Degree	174,684 16.4%	14.7%	17.8%
Master's Degree or Higher	96,648 9.1%	8.2%	10.6%
Household Income			
2015 Est. Average Household Income	\$58,304 0	\$61,175	\$71,319
2015 Est. Median Household Income	\$44,139 0	\$47,121	\$51,579
Population Hispanic or Latino by Origin			
Hispanic or Latino	121,560 7.4%	6.8%	17.6%
Population Race Class			
White	1,234,670 75.3%	83.5%	71.3%
Black or African American	257,704 15.7%	9.3%	12.7%
Amer. Indian and Alaska Native	4,655 0.3%	0.3%	1.0%
Asian	38,312 2.3%	1.8%	5.0%
Native Hawaiian and Other Pac. Isl.	777 0.0%	0.0%	0.2%
Some Other Race	104,037 6.3%	5.1%	9.8%

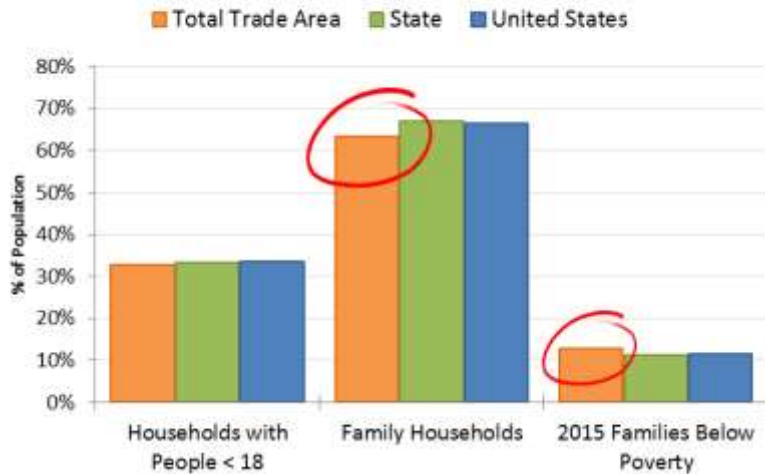
Est. 5-Year Population & Household Growth



Similar to the primary market area, the population in this total trade area is expected to grow at a significantly faster rate than the state.

Between 2015 and 2020, a growth of 3.1% is expected. In comparison, the population of the state is expected to grow at a rate of 1.6% and the population of the United States is expected to grow at 3.5%

Households & Families



In this total trade area, households are slightly less likely to be family households.

In the total trade area 63.2% of households are classified as family households, compared to 66.9% in the state and 66.5% in the United States.

In this market area, families are slightly more likely to live below the poverty line.

In the total trade area 12.9% of family households live below the poverty line, compared to 11.4% in the state and 11.5% in the United States.

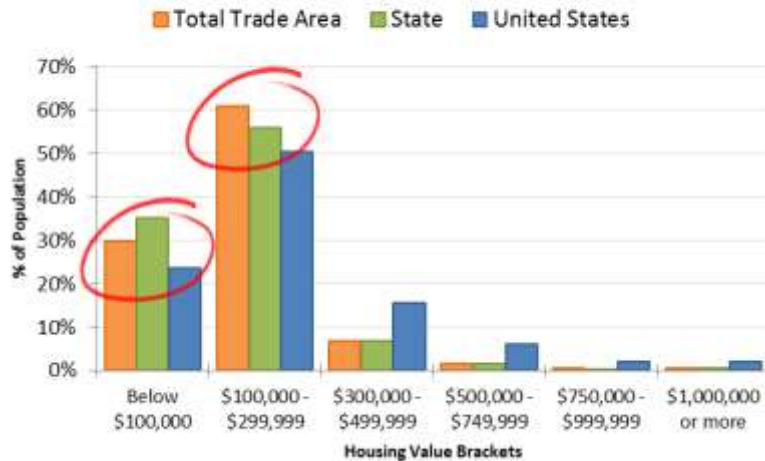
Household Income



Similar to the primary market area, households in the total trade area are more likely to have “Middle Class” incomes and less likely to have “Upper Class” incomes.

74.1% of households in the total trade area (and 72.4% in the state) have incomes between less than \$74,999, compared to 66.8% in the United States. Additionally, only 4.8% of market area households (and only 5.2% in the state) have incomes \$150,000 or higher, compared to 9.0% in the United States.

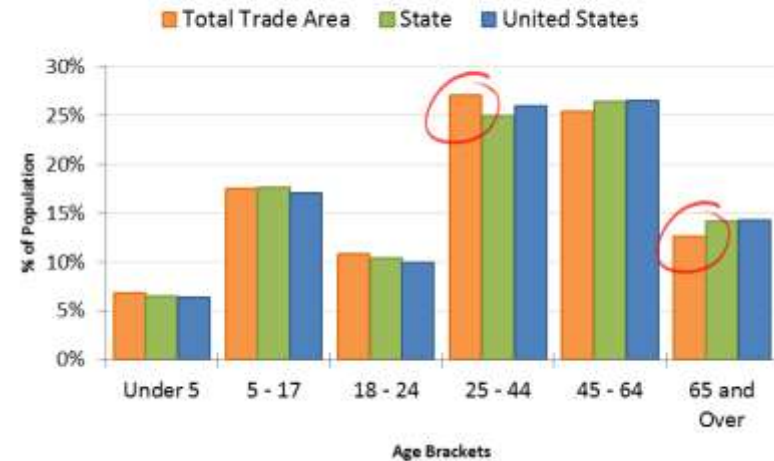
Owner-Occupied Housing Values



Similar to the primary market area, housing values in the total trade area are more likely to be less than \$300,000 than in the United States.

In the market area, 90.7% of housing values (and 90.9% in the region) are less than \$300,000, compared to 74.1% in the United States.

Population by Age



In this total trade area, the overall population age skews slightly younger than in the state and the United States.

In the total trade area, 37 is the 2015 average age (35.7 median), compared to 39 average age (37.7 median) in the United States and 38 average age (37.4 median) in the state.

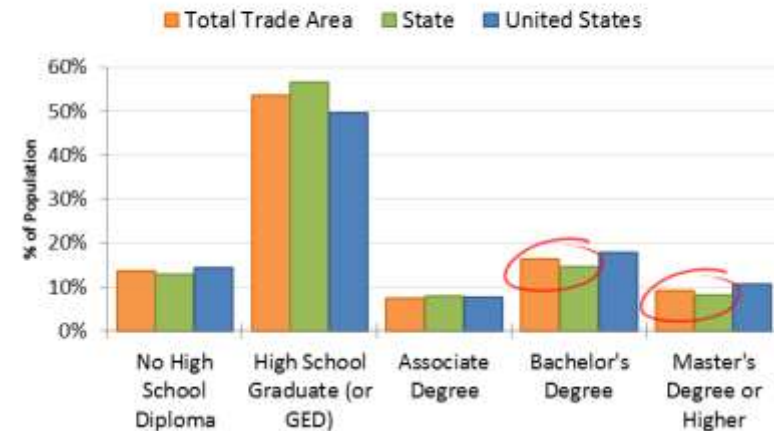
Population (Age 15+) by Marital Status



Conversely to the primary market area, in this total trade area, the population is slightly more likely to have *never* been married than in the state and the United States.

In the total trade area, 33.9% of population (age 15+) has never been married, compared to 30.0% in the state and 32.2% in the United States.

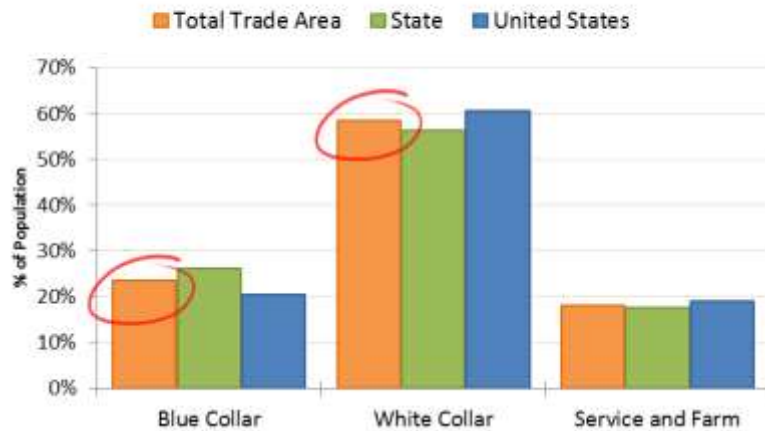
Population (Age 25+) by Education Attainment



Although there is more educational attainment in the total trade area than in the primary market area, the population in the total trade is still *less* likely to have attained education beyond an Associate Degree than in the United States.

Only 25.5% of the population (age 25+) in the total trade area (and 22.9% in the state) have attained a Bachelor's Degree or higher, compared to 28.4% in the United States.

Population (Age 16+) by Occupation Classification



Conversely to the primary market area, the population in the total trade area is less likely to work in “Blue Collar” occupations and more likely to work in “White Collar” occupations than in the state.

23.5% of the population (age 16+) in the total trade area holds an occupation classified as “Blue Collar,” compared to 26.2% in the state and 20.4% in the United States.

58.4% of the population (age 16+) in the total trade area holds an occupation classified as “White Collar,” compared to 56.2% in state and 60.7% in the United States.

Population Race Class



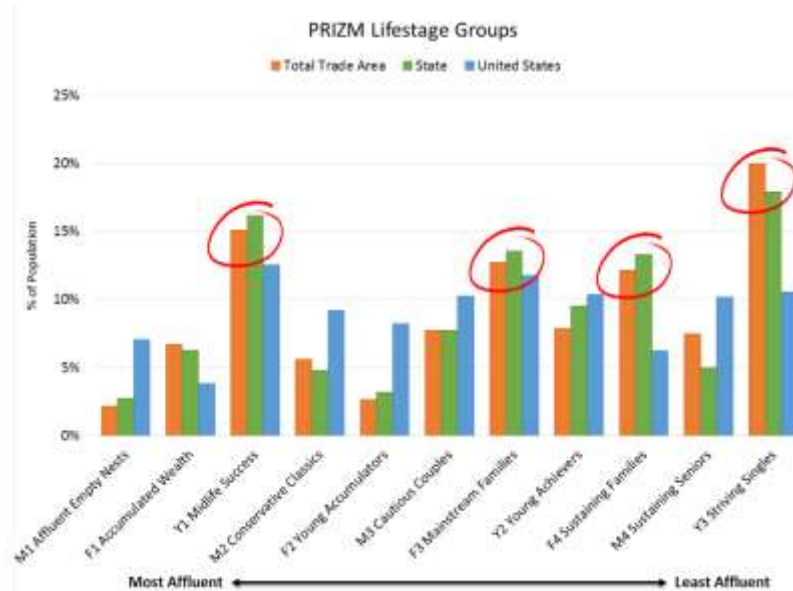
In the state, the population is more likely to identify as having non-Hispanic or Latino origins than in the United States.

In the total trade area, only 7.4% of the population (and 6.8% in the state) identify as having Hispanic or Latino origins, compared to 17.6% of the United States.

Conversely to the primary market area, the population in the total trade area is more diverse than the state.

In the total trade area, only 75.3% of the population identify as White, compared to 83.5% in the state and 71.3% in the United States. 15.7% of the market area population identify as Black or African American, compared to 9.3% in the state and 12.7% in the United States.

Market Segmentation



60% of market area households can be found in four PRIZM Lifestage Groups, three of which are also found in the primary market area.

The largest group present in the total trade area (Y3: Striving Singles) is one of the most “overrepresented” in the market area, compared to the state and the United States.

Y3: Striving Singles households comprise 20% of market area households and are 1.1 times more concentrated in the market area than in the state and 1.9 times than in the US:

***Striving Singles** make up the most downscale of the Younger Years class. Centered in exurban towns and satellite cities, these twenty-something singles typically have low incomes--often under \$30,000 a year--from service jobs or part-time work they take on while going to college. Housing for this group*

consists of a mix of cheap apartment complexes, dormitories, and mobile homes. As consumers, the residents in these segments score high for outdoor sports, movies and music, fast food, and inexpensive cars.

The next three largest groups present in the secondary market area are Y1: Midlife Success (15% of households), F3: Mainstream Families (13% of households), and F4: Sustaining Families (12% of households):

***Mainstream Families** are middle-class and working-class child-filled households. While the age range of adults is broad--from 25 to 54--these are households with at least one child under 18 still at home. And residents in this exurban group share similar consumption patterns, living in modestly priced homes--including mobile homes--and ranking high for owning three or more cars. As consumers, Mainstream Families maintain lifestyles befitting large families in the nation's small towns: lots of sports, electronic toys, groceries in bulk, and televised media.*

***Midlife Success** are childless singles and couples in their thirties and forties. The wealthiest of the Younger Years class, this group is home to many white, college-educated residents who make six-figure incomes at executive and professional jobs but also extends to more middle class segments. Most of these segments are found in suburban and exurban communities, and consumers here are big*

fans of the latest technology, financial products, aerobic exercise, and travel.

Sustaining Families is the least affluent of the Family Life groups, an assortment of households that range from working-class to decidedly downscale. Ethnically mixed, with a high percentage of African American, Asian, and Hispanic families, these segments also display geographic diversity--from inner cities to some of the most isolated communities in the nation. Most adults hold blue-collar and service jobs, earning wages that relegate their families to small, older apartments and mobile homes. The lifestyles are similarly modest: households here are into playing games and sports, shopping at discount chains and convenience stores, and tuning into nearly everything that airs on TV and radio.

Compared to the primary market, the total trade area has a significant presence of Y2: Young Achievers. Making up 8% of total trade area households (compared to 4% of the primary market):

*Young, hip singles are the prime residents of **Young Achievers**, a lifestage group of twenty-somethings who've recently settled in metro neighborhoods. Their incomes range from working-class to well-to-do, but most residents are still renting apartments in cities or close-in suburbs. These seven segments contain a high percentage of Asian singles, and there's a decidedly progressive sensibility in their tastes as reflected in the group's liberal politics,*

alternative music, and lively nightlife. Young Achiever segments are twice as likely as the general population to include college students living in group quarters.

Arts & Culture Affinities

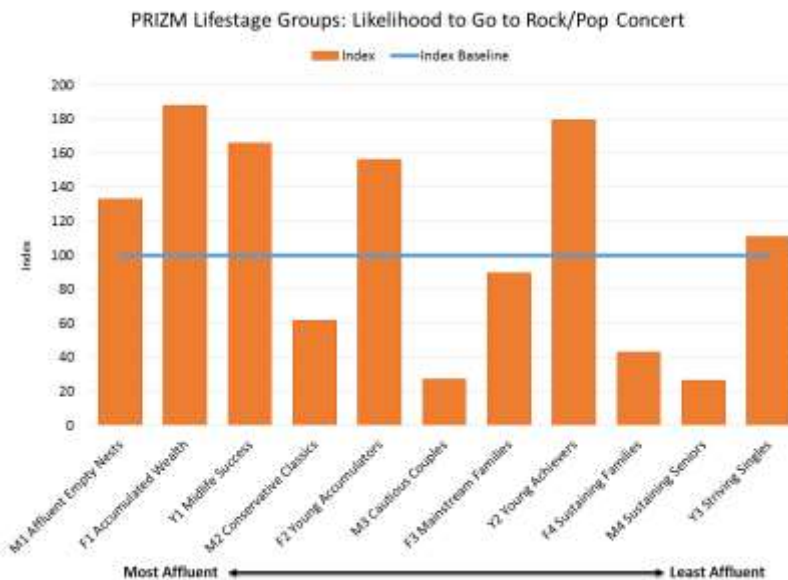
Affinities	Index	ROC
Music Is an Important Part of My Life, Agr (A)	97	-.22
Play Musical Instrument, 1yr (A)	95	-.15
Go to Zoo, 1yr (A)	94	-.16
Do Painting/Drawing/Sculpting, 1yr (A)	94	-.16
Interested in The Arts, Agr (A)	91	-.35
Go to Music/Dance Performance, 1yr (A)	90	-.25
Make Charitable Contribution, 1yr (A)	90	-.20
Do Photography, 1yr (A)	88	-.26
Buy Latin Music, 1yr (A)	86	-.22
Buy Classical Music, 1yr (A)	85	-.25
Go to Classical Concert, 1yr (A)	82	-.25
Buy Jazz Music, 1yr (A)	82	-.24
Go to Museum, 1yr (A)	81	-.39
Go to Live Theater, 1yr (A)	81	-.33
Classical Radio, Net Audience (A)	80	-.19
Jazz Radio, Net Audience (A)	76	-.19
Contribute to PBS, 1yr (A)	75	-.25
Belong to an Arts Association (A)	70	-.34
Contribute to PBS,\$50+, 1yr (A)	69	-.27

The demographic and lifestyle profiles of Arts & Culture interests, behaviors or activities correlate weakly to the profile of the total trade area (as indicated by low or negative ROC values); however, there are some behaviors with close to average (100) indices, indicating households in the market area are more likely to participate in those activities than the average US household.

II. In-Depth Consumer Insights

AMS uses Simmons® National Consumer Studies¹ to analyze market area attitudes, product and brand preferences, media consumption habits and demographic and lifestyle characteristics.

Comparing the 2014 Simmons' profile of households whose adults "Go to Rock/Pop Concerts" (at least 1 time a year) to the primary and secondary market profiles, we find that certain Lifestage Groups have an above average (measured as an index over 100) propensity to go to "rock/pop" concerts:



- F1 Accumulated Wealth: these households are 1.9 times more likely to go to "rock/pop" concerts
- Y2 Young Achievers: 1.8 times more likely
- Y1 Midlife Success: 1.7 times more likely

- F2 Young Accumulators: 1.6 times more likely
- M1 Affluent Empty Nests: 1.3 times more likely
- Y3 Striving Singles: 1.1 times more likely

Comparing these findings to the market area scan:

- In the total trade areas, there is a total of 329,551 households contained in these Lifestage groups
- Using the national average based on the Simmons' data, an estimated 35% of these households will attend at least one "rock/pop" concert during a single year.

Finally, we can map (*see next page*) the theoretical market potential (based on the number of households belonging to these target Lifestage groups found in each ZIP Code vs. the total number of households found in each ZIP Code) to help determine the areas of greatest potential for attending "rock/pop" concerts.

Market Potential Indexes (MPIs) over 120 indicate the highest potential for containing households that may be interested in attending a "rock/pop" concert.

ZIP Code	Name	MPI
47406	Bloomington, IN	181
46204	Indianapolis, IN	171
47405	Bloomington, IN	169
47408	Bloomington, IN	168
46250	Indianapolis, IN	156
46202	Indianapolis, IN	152
46278	Indianapolis, IN	146
47401	Bloomington, IN	142
47404	Bloomington, IN	142
46220	Indianapolis, IN	136
46256	Indianapolis, IN	136
46259	Indianapolis, IN	135
46161	Morristown, IN	131
46143	Greenwood, IN	129
46106	Bargersville, IN	128
46112	Brownsburg, IN	127
46237	Indianapolis, IN	124
46142	Greenwood, IN	123
46110	Boggsstown, IN	121
46268	Indianapolis, IN	121

¹ Source: 2014 Experian Simmons Report. Copyright 2014 Experian Marketing Solutions, Inc. All rights reserved.

